DOCUMENT RESUME

ED 269 858 EA 018 398

AUTHOR Jarc, Jerry A.
TITLE Development and Public Relations for the Catholic School. NCEA Keynote Series No. 3.
INSTITUTION National Catholic Educational Association, Washington, D.C.
PUB DATE 85
NOTE 68p.
AVAILABLE FROM Publication Sales, National Catholic Educational Association, 1077 30th Street, N.W., Suite 100, Washington, DC 20007 ($6.60 prepaid; actual shipping and handling charges will be added to billed orders).
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Catholic Schools; Educational Improvement; Elementary Secondary Education; *Fund Raising; *Institutional Advancement; Private School Aid; *Public Relations; *Student Recruitment

ABSTRACT

Catholic elementary and secondary schools are facing increasing costs, more complex administrative demands, and limitations on the amount of revenue that can be expected from traditional sources within the church congregation. To find new sources of support these schools must adopt the techniques of development used successfully by colleges and universities. "Development" involves identifying, coordinating, and expanding the positive forces within an institution to enable that institution to meet its potential. The process includes efforts to improve the institution to match the image desired as well as to communicate that image to those offering support. Development focuses on four points: the quality of the product or service provided, the quality of the institution's management, public perception of the institution, and the institution's ability to take advantage of available resources. Following an introduction to development concepts, this handbook offers practical considerations of public relations, financial resource development, and student recruitment. The school's publics are defined and the uses of public relations calendars and committees are outlined; essential elements in resource development programs are discussed and several specific methods for generating revenue are described; and techniques for persuading students, identifying potential students, and managing recruiting activities are presented. (PGD)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
X This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

NCEA Keynote Series
No. 3

ED269858

DEVELOPMENT AND PUBLIC RELATIONS FOR THE CATHOLIC SCHOOL

Jerry A. Jarc

EA 018 398

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
P. Kokus
TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA

DEVELOPMENT AND PUBLIC RELATIONS FOR THE CATHOLIC SCHOOL

Jerry A. Jarc

© 1985 National Catholic
Educational Association

TABLE OF CONTENTS

Preface i

1. Development 1

Planning and the Test of Quality 2
Development 3
Focus of Development 4
A Marketing Sense 11

2. Public Relations 15

The School Publics 19
Internal and External Forums 22
Public Relations Calendar 23
Public Relations Committee 24

3. Financial Resource Development 29

Essentials for a Good Resource Development Program 30
Fund-Raising 36
Annual Giving 38
Past Parents and Alumni Associations 40
Planned Giving 41
Capital Campaigns 43
Endowment 43

4. Student Recruitment 49

Persuasive Techniques 50
Selling the Product/Service 51
The Consumer Audience 54
Recruitment Activities and Programs 55
Recruitment Calendar 58

Suggestions for Using This Booklet 61

About the Author 65

PREFACE

The NCEA Keynote Series is made possible by a grant from the Michael J. McGivney Fund. This fund for new initiatives in Catholic education came through the generosity of the Knights of Columbus under the leadership of Virgil C. Dechant, Supreme Knight.

The Reverend Russell M. Bleich, Superintendent of Education in the Archdiocese of Dubuque, Iowa, made the original suggestion for preservice and inservice materials for teachers. Thanks are due the authors of this series and to the staff of the Education Office of the Archdiocese of Dubuque for the practical application section of each booklet.

Special thanks go to Ms. Eileen Torpey, the major editor of the series. The editorial committee consists of the Reverend J. Stephen O'Brien, Executive Director of the Department of Chief Administrators of Catholic Education, Sister Carleen Reck, Executive Director of the Elementary School Department, and Michael J. Guerra, the Executive Director of the Secondary School Department.

1. DEVELOPMENT

Catholic schools have been the financial responsibility of the laity from their very beginning. Those Catholic communities that wanted schools for their children also committed themselves to paying for them. Their belief that the Catholic school would preserve the traditions and practices of their faith was strong enough to build buildings, hire teachers, contract with religious congregations from as far away as Europe, and in general to meet all the financial obligations to keep the schools available for their children.

Most schools operated by parishes or dioceses depended on the generosity of the laity to the Sunday offertory collection, the "free" labor of religious and priests and nominal wages for lay teachers to keep them operating fiscally. Many private schools, which are owned and operated by religious congregations, charged tuitions and fees from the beginning and consequently established a sound fiscal base for operating. Schools operated by dioceses, especially secondary schools, also were established on the basis of at least a nominal tuition, an operational or capital subsidy from the diocese and a fund-raising program.

The Catholic school system now is faced with an economic situation that challenges this traditional financial support structure. Dioceses can no longer afford to give operational subsidies. Religious congregations no longer have the personnel from among their own ranks to operate their schools with less costly salaries. Tuitions cannot continue to rise. The offertory contributions have not kept pace with the need for new parish programs as well as the escalating costs of operating parish schools; in many cases, the school has become a burden or drain on parish finances to the detri-

ment of other parish programs. A needed examination and review of the support structure is taking place in many areas of the country.

The economic factors are many. The changing complexion of staffing schools is perhaps the primary factor. Schools were traditionally staffed by religious sisters, brothers and priests. Their token stipends enabled schools to operate at a minimum cost level. As more and more lay persons were employed to replace religious, the cost of operating schools increased. Decreasing enrollments due to shifts in populations from the central city to the suburbs also increased costs; schools had smaller student populations, but essentially cost the same to operate. Other factors also increased costs: demands for teacher certification and benefits; state regulations and curriculum demands; utility costs and building maintenance; recruiting programs for students; a wider variety of courses, clubs and sports. Pastors and school administrators were caught in the late 1960's with escalating costs and a lack of understanding on the part of the laity about why schools suddenly became expensive. The laity responded in different ways: some chose to withdraw their children from Catholic schools (which in reality compounded the financial picture), while others chose to seek out ways to finance the schools through increasing their contributions and a variety of other programs designed to raise funds. They established tuitions and fees for the first time and planned special fund-raising events (raffles, candy sales, bingo, festivals), which quickly became a standard for Catholic school funding across the country. During the late 1960's and 1970's, this pattern of funding enabled many schools to "catch up" and stay open. It appears somewhat unrealistic, after a decade or two of experience, to believe this funding pattern will be able to continue.

Planning and the Test of Quality

The Catholic laity, who began Catholic schools and continued to support them during the worst crisis, are still supporting them today. Studies prove this support and continued desire for Catholic schools.

What has happened with the emergence of lay boards, finance committees and more lay staffs is the demand for more *planning* and an intense *test for quality* in schools. Administrators and pastors are being asked where they see their schools going in terms of mission, how they are going to meet the demands for quality education, properly equipped classrooms, competitive teacher salaries and benefits. There is more pressure than ever being applied for planning, and those schools which have experienced planning have charted better futures and more solid footing for the decades ahead. This planning considers the academic programs, staffing patterns, buildings and equipment and revenues and expenditures structures, now and for the future.

Development

Development and public relations are new terms for Catholic schools. What planning and the test for quality have revealed in almost every case is that the Catholic schools have to take a more creative and aggressive posture about their future. They must seek alternate ways to fill their buildings with qualified students who believe in the goals of Catholic schools and to do so, they need to get into "marketing" and "public relations" and "consumer recruiting." They need to use successful college and university development techniques to assure a sound financial base of operation.

Development is a process which *identifies, coordinates and expands* the positive forces within an institution to enable that institution to reach its potential — its destiny and mission as an educational institution, in this parish, this city, this time within the church. As a process dealing with all the positive forces in a school, it naturally includes everyone in and around and a part of that institution. The process incorporates the thinking and creativity of every staff member, professional and support staff, based on the assumption that every staff person plays a role in the destiny of that institution, for good or for bad. What happens in the science class or how the secretary answers the phone has importance in the overall process. Everything, every person, every event in that school

relates to the total image projected. If the science program is perceived as weak or lacking true quality, often the school is perceived the same way. If the secretary answers the phone with little or no concern for the needs of the caller, the school is perceived as uncaring. In the development process, the concern is for the total image. Whether the school can attract new students, new resources (human and financial) will depend a great deal on the perceptions people have of the institution. The development process deals first and foremost with image. If the image of the school is strong, the development process can be highly effective; if the image is weak, the institution must take corrective action before it will be able to attract both people and dollars in its support.

Focus of Development

In order for a school to coordinate an effective development process, efforts should be focused on:

the quality of the product/service	—QUALITY CATHOLIC EDUCATION
how the school is managed	—SOUND BUSINESS PRACTICES
the public perceptions	—EFFECTIVE PUBLIC RELATIONS
receptiveness for resources	—RESPONSE: HUMAN AND FINANCIAL RESOURCES

Development, as an effective process, will not be possible in an institution that lacks the essential ingredients found in the four focal points. The planning process must zero in on these focal points, deal with the realities which are apparent, set a course for corrective action, and take positive steps yearly and over the long term. Development is not a process which attempts to cover up weaknesses or produce an image that is not real. Development is open, dealing with realities and perceptions of people (good or bad). Development is not a slick marketing tool that attempts to persuade or influence people to "buy" something that is not whole.

1. Quality of the Product/Service.—Catholic schools, like any other product or service, must be good, attractive, acceptable and beneficial to the consumer if they are to sur-

vive the competitive market.

It is vital that the school be perceived as good and in fact *provide or offer quality CATHOLIC education*. A review of the programs, activities, curriculum, staffing, test results etc. should reveal a school of quality. That is not to say that every school should have reached its destiny and be classified as excellent and beyond improvement. The school should be an exciting enough center of learning that it offers confidence to the parents, students and prospective donors and demonstrates both the willingness and ability to strive for perfection. If it is not apparent that growth is taking place, this view poses the very first obstacle to a true development effort.

Emphasis must be placed on the term "Catholic" within the focus of quality education. They are Catholic schools, not equal to or better than the public schools. Classes and activities, philosophy and mission statements must reflect the unique distinctiveness of a Catholic school. In the development process, we are dealing with resources especially attuned to Catholic traditions and services; what we are "selling" is education as delivered by a Catholic institution.

It is important that the planning process force a strong commitment to quality Catholic education. The definition and mission statement of any school will determine in the long term its essential base of support and the direction of the development process: to whom the program is directed; who benefits; and who will continue to support the institution.

No one is saying that Catholic schools must serve only Catholic students. There are many schools with a high percentage of non-Catholics. By their very nature, Catholic schools deliver an entirely different value system, have a distinct mission, origin and base of support. In the planning process, it must be clearly understood by all what kind of school is being operated.

Defining quality is a difficult process for school administrators. Because principals, teachers and staff are so close to the day-by-day operations of the school, programs and activities, results are almost assumed. The little

and big successes which take place daily in the classroom are not *identified* as positive forces for selling the school to prospective consumers and/or benefactors. Student achievements in a fifth grade math class or an essay contest in the eighth grade English class on patriotism often are not viewed as identifying marks of the quality of the product or service. These activities and successes are not *used* to build, rebuild or reestablish the image of the school and what it has to offer parents and students. Principals and teachers must become aware of how these factors serve as positive building blocks in a total development program. The more that can be said about the quality of the program, the better will be the school's chances for a long-term attraction to students and resources.

How these positive benefits can serve the development process will be further discussed in the public relations section. Public relations deals with communicating with people, consumers, buyers of our products. It is essential to identify what it is schools are selling, not in terms of course offerings and physical facilities, but in terms of benefits to both parents and students. After the *identification* comes the *coordination* of these positive forces into specific action steps, how they might be used to the benefit of the institution, *expanded* upon for growth.

How does one test for quality? How good are schools and what benefits are offered? For the most part, the testing can and will be clear from a number of sources: retention rates (how long students and faculty stay with the school); testing scores (particularly those scores that indicate specific strengths in certain disciplines); parent support (excited to be a part of the PTA, fund-raisers, etc.); high school placement or college placement (entrance or acceptance in certain schools, scholarship awards); and attitude. Attitude says more about the quality of operation than a lot of facts and figures. Although harder to define in terms of quantity, the very atmosphere of the school and attitude of the students, teachers, and those on the staff, as well as parents and other support groups is a good indication of quality. Positive attitudes will bring out the very best in people, in students, teachers,

parents and staff, and will create a force within the institution where challenges and opportunities are accepted and met with creativity, dedication and drive.

2. Sound Business Practices.—A quality and progressive school is also a well-run school from an administrative and fiscal point of view. On the other hand, it can also be assumed that where quality is lacking or is not in evidence, it will have a lot to do with how the school operates.

Sound business practices involve the entire school community. A clear organizational chart gives order and direction to the million-and-one operational procedures which affect the staff, support services, students and parents. Who is responsible and for what, produces a sense of direction, accountability, responsibility and job performance. Decisions cannot be made unless everyone knows and understands who makes them. Responsibility cannot be clear unless those roles are defined and a system created for checking and verifying those roles.

Every school needs not only an organizational chart, but also a function chart, to clearly define for everyone their roles and interrelationships. A positive attitude will be quickly destroyed if it is met by confusion, conflicting directions or lack of decision-making. Function charts indicate specific functions to be undertaken by individuals and the percentage of their time allocated to those functions. When clearly defined, everyone knows who should be doing what, what the priorities are and how much time should be spent on each function.

Other practices include budgeting, accounting, purchasing, handling of revenues and expenditures, fund-raising philosophy and the treatment of donors and prospective donors. Each year the parish/school should have a clear indication of fiscal needs and how those will be met. This plan should be conveyed to the staff and the parents (parish) as well, so that everyone has a clear picture of the fiscal framework in which all must operate and what their respective responsibilities are at this time. This is particularly true for supporters or donors; they will not understand why they must contribute or raise funds

unless they have some indication of the total fiscal goals for the year or for the longer term.

Accounting, purchasing and the handling of money are areas that need sharp skills. How we use existing resources, care for our buildings and grounds, equipment, etc., will do more to attract new resources than some other fancy program. If parents cannot get a clear statement of tuition because of poor bookkeeping, or how they should contribute toward the fund-raising goal, they will form negative impressions. If parents and benefactors drive by the school in the dead of winter and see banks of open windows, they will know that money is being wasted and wonder why more is needed. Carved-up walls and broken equipment will produce other negative impressions.

Caring for what the school now has, using money wisely, knowing how materials are being purchased and cared for will lay the groundwork for acceptance of the school's appeal and need for other resources.

This area should be reviewed, along with the quality of education and public relations, in order to set in motion an effective development process.

3. Effective Public Relations.—It is a new phenomenon for schools to be thinking in terms of public relations because the need apparently was never there in the past, and because public relations was often equated with a Madison Avenue high-pressure sales technique. Schools, in the past, did not have to sell or promote themselves. Catholics sent their children to Catholic schools because the pastor said so, the church said so. Enrollments were consistent, people responded as directed. There was no lack of confidence in the quality of the job being done in those schools.

   Today the situation has changed to the extent that it has become almost essential for every school to have some sort of public relations program. Schools are finding that decreasing enrollments, lack of support and lack of confidence really stem from a lack of knowledge and understanding on the part of their publics. When people understand what is going on in schools, that knowledge

generates sufficient support, enrollment of students and other responses.

An effective public relations program deals with perceptions that people have of the institution. It does not try to change those perceptions by slick Madison Avenue techniques. Rather, it attempts to deal with the realities of those perceptions. The program finds out what the perceptions are, evaluates them, and takes steps to deal with them.

The typical action steps in public relations begin with the establishment of parent newsletters, alumni newsletters, special letters or information bulletins to donors and supporters, recruitment brochures and programs for students and teachers, and other events and activities which highlight the school.

The process calls for *communicating* with people, establishing relationships with people, and creating an attractive and highly desirable product that is received and acceptable to the broadest community being served by the school.

4. Response: Human and Financial Resources.—The bottom line of development appears to be human and financial resources, the people and funds to get the task done. The focus of development is a bit broader in that it starts with the *product*, considers how the institution is *managed* and how it is *perceived*, as a basis for what human and financial resources that institution can attract.

The school community must also be perceived as willing to accept available resources. It would appear that this might be a contradiction in light of the fiscal and human needs of most schools, but the fact of the matter is that some schools do not appear to be in need of either resource.

In the planning analysis that will take place with the study of each focal point of development, the study includes how willing and ready the institution is to receive additional resources, how organized and structured it is in the sense that it knows what it needs to get the job done and how to pursue those needs.

Receptivity to response means that an institution is will-

ing to accept and work with volunteers, for particular tasks to be done around the school (secretarial, library, cafeteria-playground), for board and committee work (finance, development, public relations, school board), for fund-raising events and programs (chairpersons, committees, contacts) and a variety of other possibilities. The school must define its human needs in terms of people, define tasks and recruit and service volunteers who might fulfill the tasks at hand.

Receptivity also means that the condition is right for donors to step forward with major commitments of funds for program and activity needs that not only will serve the needs of the institution, but also will fulfill the needs of the donors. How ready is the school to receive a gift of say $50,000 or $100,000? What will the funds be used for and what impact will they have on the overall program? What benefits will accrue to the students and what benefits to the donors? In many cases, although it may sound ludicrous, these questions are not easily answered. The response is usually a vague collection of investment opportunities that are neither attractive to the donor nor impact significantly on the total educational picture. Schools, in their planning, must establish a resource development catalog that details program, equipment, building, capital and endowment needs in clear, concise terms, with a full description of what is needed, how that will solve a need at the school, the benefit to the donor, the actual cost of the item or program and what it would take to endow that program so that it will continue.

Receptivity means that people are welcome to invest in the institution at various levels, that the school provides a variety of gift or investment opportunities. For some, this will mean support of typical fund-raising activities (bingo, candy sales, raffles, etc); for others it will mean funding classrooms or building buildings, underwriting the tuition of students (endowment fund contributors); for a corporation or business organization, it might represent an opportunity to be a partner in the educational process; for foundations it might mean seed money, challenge grants. The more and varied the op-

portunities are to meet the needs of our constituency, the more exciting will be the climate for more major commitments of people.

As the school analyzes all the information gathered in the planning process, especially in relation to the focal points of development (quality Catholic education, sound business practices, effective public relations and response: human and financial resources), it becomes apparent that this information, illustrating the *positive forces* at work and opportunities for growth, will need *coordination*. This is the second phase of the development process.

Coordination calls for organizing the data into action steps. What good things does the institution have going for it, how can they be improved? What gaps need to be filled, how will they be addressed, who will do them and what do we need to get them done? What needs to be done in the short term, what needs to be done long term? The planning group determines the overall coordinating function, sets priorities and determines allocation of school resources to implement the needs assessment statements.

The *expansion* of positive forces is a natural consequence of identification and coordination. We should capitalize on those things we do well, do them better or put them in a broader dimension. Where there are gaps in need of more time and resources to develop, we should give them that determination. Under the worst of conditions, the development process is mind-expanding and creative. New opportunities become available; unheard-of resources appear in response to planning, coordination, or attitude changes.

A Marketing Sense

With a clear understanding of the focus of development and the need for expansive thinking and attitudes for development, attitude becomes a fundamental prerequisite for success. In secular circles, it is often referred to as a "marketing sense": a somewhat undefined sense that becomes the backdrop for everything attempted in the area of development.

A *marketing sense* places the focus on the buyer, the con-

sumer, and not on the need of the organization to sell, recruit or raise funds. The sense is that the consumer has needs that must be met, goals in life that must be fulfilled. Consumers need to be appreciated, wanted, involved, to give and to share. When the focus is on those personal needs, the overall response will be greater than if the focus is merely on the needs of the organization. This concept should filter through all that is done within the school and should affect recruitment efforts for students, how newsletters are written, the direction of annual appeals or major donor contacts. The recruitment brochure is written in language telling the parents and students that this school will meet the needs of their sons or daughters; the brochure is not a catalog of courses, busing information and costs, but rather a *touching*, real experience of how the school can influence the future student's life.

The consumer becomes "king," to use another phrase from business. What the consumer wants and needs is what the school has to offer. The focus is on unique *competency* and how that competency meets the needs of the consumers. Marketing is not used to gloss over something the school is not; rather it shifts the focus and emphasis. It makes the difference in writing the alumni appeal letter, so it is not a letter detailing need, but rather one emphasizing the value and privilege of having been educated at this school, how graduates now have an opportunity to help others, give thanks and how they are honored and special among the larger group of alumni.

A marketing sense is evidenced by the entire organization, when the entire organization focuses on the consumer. A good classroom teacher focuses not so much on the syllabus, but on meeting the needs of the students. Teachers will review, slow down or speed up, depending on how students react. The secretary in the main office will answer a call as though it were the only one today and the caller were very important. A marketing sense is an attitude; public relations and development are process and action oriented.

Summary

1. Catholic school financing for the future will depend on the creation and implementation of effective development programs.
2. Development is a process which identifies, coordinates, and expands on the positive factors within the school. Every aspect of the total school operation, every person within the school is a developer.
3. With a development program, the school focuses on the *quality* of its programs or demonstrates a plan for arriving at quality in order to make it more attractive to investors of human and financial resources.
4. An honest *test for quality*, a corrective action plan, publicizing and promoting identifiable quality factors within the school will lead to new avenues of support.
5. Attracting new resources will depend largely on how current resources are managed. Sound business-like practices include organizational charts, defined job functions and responsibilities, budgets, accounting and reporting systems.
6. Effective public relations focuses on communicating with people, establishing relationships and commitment. From good information comes interest, which leads to involvement and investment.
7. A public relations program deals with perceptions people have of the school. It is a comprehensive effort at building confidence in the present and future reality of the school.
8. Human and financial resources of every dimension are the response to quality, good management and an effective system of communication and reporting.
9. Schools that demonstrate a *receptivity* to people and financial resources, and illustrate a creative planning mode of operation for dedicated people and resources, will attract both.
10. A marketing sense deals with the needs and desires of parents and students and donors. If these needs are satisfied in Catholic schools, "buyers" will be attracted in terms of pupils, parents and resources.

2. PUBLIC RELATIONS

Public relations is a very important focus of development, an essential part of the overall program, which is designed to sell the institution to prospective students, and encourage human and financial resources. It is so essential that every school, elementary and secondary, have a specific program, as a priority, in place annually to meet this focus of the overall process.

What is public relations? P.R. can best be defined by what it attempts to do: create relationships with publics to an institution. It offers to various publics an on-going view of the work of the institution in such a manner as to make that institution very attractive and appealing, worthy of the investment of time and money, making "buyers" out of those who now see and understand the institution. P.R., by its very nature and objectives, must be personal if it is to be effective in establishing relationships—a position in the mind of consumers, an acceptance and readiness to invest or get involved.

Public relations also cuts across the entire institution. Everyone becomes a public relations person within the school. How one teacher acts with people, how the school handles conflict, how clean the school is, how quickly people respond to the needs of parents and students, all either add to the public relations dimension or work against it. As in all phases of development therefore, the focus on public relations becomes an institutional priority and objective—involving everyone on the staff.

A public relations program in any given institution involves a number of objectives, which vary from school to school, although certain objectives are standard for every program.

Objectives:	*Response	—Do something
	*Awareness	—Keep us in mind
	*Image Building	—Real, not perceived
	*Educate	—Continue to believe

When preparing a public relations piece—a newsletter, media release, brochure, appeals letter or package—the institution must first determine the specific objective of that effort. It is not always possible to cover more than one objective in one specific piece, although that is often the case. An appeal for funds, for example, is usually accompanied by a brief introduction, which takes the format of either news or of information that educates the constituency about a new program or activity and its need.

The specific objective often will determine the language used and the actual format of the piece. A recruitment brochure, with a specific objective of attracting fifth to eighth graders to a particular school, will be written for young people, using simple language, exciting photos, and will be geared to areas of interest to that age group. On the other hand, if a recruiting brochure is to be used or directed to the parents of those students, it may be possible to use the same piece and accompany it with another letter or flyer, specifically directed to parents and in support of the student brochure. The determination of the objective and the audience is more important than the creation of the text and media used. A well-planned and colorful brochure may have little or no effect if directed to the wrong audience. An appeal letter to alumni may take several approaches, depending upon the age group targeted for the appeal. What is written for the classes of the 1920's and 1930's is different from the approach to graduates of the 1960-1970-1980's era. In fact, research indicates that the classes of the 1960's, because of the attitudes of that era, are harder to reach than many others and most probably will need a specific effort to involve them in the mission of the school. Alumni events and activities should be geared to age groups and interest groups, whether social, educational or spiritual in nature, and occur at varying times

throughout the year, if they are to attract reasonable gatherings of people.

A *response* objective seeks to secure a response or have the target group do something: give money; attend a function; volunteer; register their children in the school. The package used for that effort should be clear and concise; little time and energy should be spent to meet some other objective. By trying to do too much with a package,one can fail to accomplish the primary objective. If a loyal alumnus has given consistently in the past, he or she does not need to be overly convinced nor overly solicited.

Awareness as an objective hopes to keep the school in the mind of the publics. P.R. efforts with this objective are general in nature, even to the extent of sending pieces to specific target groups. For example, boards, committees, VIP's, major donors, etc., may be selected to receive copies of all materials generated—from news releases and brochures, to copies of the school newspaper and yearbook. The intent is to keep people aware and ready, so that more personal efforts later on will be much more effective because the audience will have a better understanding of the institutional needs and programs. While awareness pieces are broad in scope, they may be generated for specific target groups.

Image building is or should be a common objective in all schools. Again, historically this was not a problem to be addressed. It was a good school because the pastor said so and because parents sent their children there. With the change in parental attitudes toward Catholic schools, there is more need today than ever before to build the image, to reaffirm the quality and character of our schools and how they benefit the character formation, and spiritual and academic growth of our children. Image building should be done every day. The fact is that it does go on every day, whether or not the school is aware of it or whether the school makes any overt effort to control or manage it. When a student comes home complaining, a teacher loses his or her temper, the principal uses a less flattering tone of voice on the P.A., or the grass in front of the school is overgrown and the trash in heaps, *some* contribution is being made to the image of the school,

positive or negative. The key here is in controlling the process, not from the point of view of censuring or silencing, but by taking possession of those recurring events and people and dealing with the realities that exist. Public relations does not attempt to cover up or coerce; it deals with the reality, the perceptions that people have. An effective public relations program is personal, and in the structure can better impact on people and their perceptions.

It is important to repeat that the methods used by schools are different from those used by Madison Avenue. Because of the personal nature of our service to people, our approach, in order to be effective, must also be personal. Schools need to care about how people perceive us, what they like and dislike about us and why and what the school can do to either enhance that perception or correct it. No slick brochures or media blitz will effectively address the issues at stake. A school that is publicly criticized for something should address that issue in the same forum. On the other hand, where there are gaps in the information process or system, the school should attempt to fill that gap with correct and timely information.

The fourth objective is *education*. Very often the public does not know what the school is all about, simply because of a lack of consistent, professional-looking, accurate information, from that provided to parents and students and continuing through that given to alumni, major donors, and the civic, diocesan and local communities. An analysis of the flow of information to the parents, for example, will test the case. If parents are receiving only "housekeeping" information through the principal's bulletin each week or month, the process is not being used effectively to educate or to ask those parents to continue to believe in the school. The media chosen, for example, a principal's bulletin, also should contain information and stories about successes in the classroom. Those stories should highlight class projects, particular units of study, holiday projects, service projects, liturgical experiences, student reactions to current events or community events, stories about support people and what they are doing for the school. The process *educates* and keeps people informed and interested; that interest leads to a readiness

to accept the school's invitation to get involved in a variety of ways. Without the educational process, parents and other prospective resource people will never be given the opportunity to respond. In large parent and alumni groups, people want to know from other people, on an individual basis if possible, where they might fit into the whole process, how to give of themselves, to fill their needs and also to help meet the needs of the institution. The "newsletter" process, as opposed to a principal's bulletin, refocuses the flow of data and information, into more human-interest, emotional, benefit kinds of material, which will have greater impact. It should be noted that while the "housekeeping" bulletins will always be a part of the school program, especially considering large enrollments, they should not comprise the total effort of communicating to parents. Other media used, such as monthly PTA meetings, should be given the same orientation: although there is a business side to these meetings, there should be an education side to them as well. The best kind of PTA meeting involves a dialogue between parents and the administration, and demonstrations of student achievements.

The School Publics

An effective public relations program, from its very inception and design, should attempt to include all the various publics that are or should be a part of the total school community. There are those publics that the school deals with every day; there are those publics they should be communicating with; there are some who should receive nominal attention; and there are those publics who are potential audiences. Not all groups will be targeted for the same media or intensity, thus the need for a variety of public relations efforts.

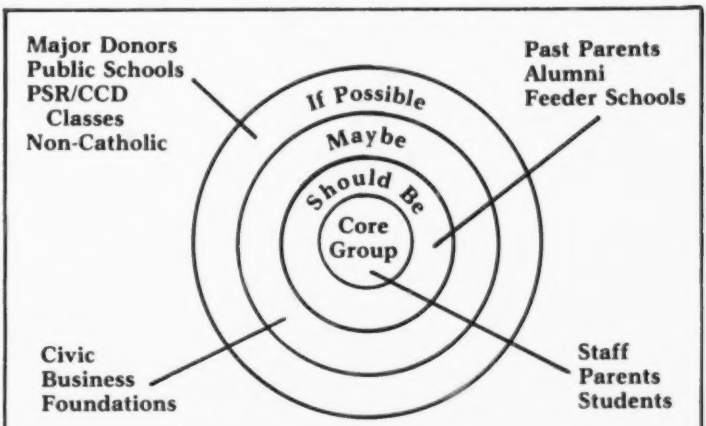
It is not unusual for a typical school to be dealing with or have attached to it about 40 different publics or groups of people that are part of the total school community. The number will vary but what that figure points out is the potential for resources that any given school has and underscores the need for a variety of public relations efforts.

A partial list of publics would include the following:

Parish Publics	*School Publics*	*Local-City/ Community*
Pastor	Principal	Neighbors
Associate pastors	Faculty/past faculty	Mayor/city councils
Deacons	Children	County commissioners
Seminarians	Custodial staff/ cafeteria	Protective agencies
Parish council		Business community
Education commission	Office staff	Realtors
Parents	Alumni	Welcome Wagon/Jr. League
Parishioners w/o children in school	Trustees	Police/fire/rescue
	Volunteers	Juvenile services
Parishioners w/o children: young/old	Committees	YMCA-YWCA, Boy Scouts, CYO
	Clubs/organizations	
Siblings	Past parents	Governor's office
Relatives/grandparents	Founders	Congress, House of Representatives
Neighbors	Major donors	
Senior citizens	Banker/attorney/CPA	
Pastoral team		
Ethnic groups	*Metro Boards*	*Educational Agencies*
Clubs		Local univ./college
Janitors/cooks	*Regional Boards*	State univ./college
		Public school principals/faculty
Schools	*Archdiocesan/Diocese*	
Grade schools	Bishops	Superintendent of p.s.
High schools	Vicar for education	Technical schools
Pre-schools	Superintendent/ consult.	State dept. of educ.
Junior high schools		
Nursery schools	Chancery staff	*Others*
	Area directors	Cath. community services
	Youth/family coord.	
	Religious educ. office	Media
		Religious communities /province
		Suppliers
		Foundations
		Corporations
		Labor unions
		Professional clubs
		State Catholic conference reps.

For many of these groups, it will just be a question of courtesy to keep them informed. For other groups, the potential impact will be more creative in response. A mayor may not be able to direct city money to the school, but he/she may be able to keep relationships and mutual services running smoothly between city and school and lend his/her name and influence. Corporations and businesses in the local area might have a greater appreciation of the school if they knew what the school is and has been doing for the community; in some cases, the presence of a local school and parish impacts directly on the businesses in the area.

How the school communicates and to what intensity will depend on where the publics fit within the illustration below. Those publics at the heart of the institution will obviously be given more intense attention; as you move out from the center, the frequency and intensity will vary, depending on specific objectives and target groups in any given school year, program or campaign effort. Within each group illustrated are certain sub-groups, which also will change. A secondary school might concentrate on eighth graders in specific feeder schools with the objective of doing more for a target group. Next year that may change to another set of eighth graders from another set of feeder schools.



Relating to School Publics

Each school must identify those publics specific to them and those publics that are general in nature to all. In the exercise and listings of publics also will come the selection of various media to accomplish the job. The media is not as important as the target group and objective of the effort to that target group. Whether the school uses a newsletter, slide show, bulletin board, exhibit in a shopping mall, mailing pieces or coffee-klatches in the homes of parents, the target group and objective must be clear from the very beginning of the media planning. Is it necessary to show a recruitment slide show to parents who have already enrolled their children, or should the slide show program take an entirely different focus? Should graduates of the class of 1940 only hear about what their classmates are doing in a separate alumni newsletter, or should they also be receiving news about how good the school is today?

Internal and External Forums

Publics also will be divided into internal and external publics. Perhaps the most often misinformed or uninformed publics are the pastor, the faculty, the non-professional staff and the student body. These people constitute the internal publics who should be receiving the most intense and comprehensive of communication efforts. Nothing disturbs the creative and free-flowing efforts of individuals more than being left in the dark. The Monday-morning bulletin, frequent but perhaps short staff meetings, and department meetings will greatly add to both the smooth operation of the school, as well as the positive attitudes of the entire staff. The secretary and the janitor need to be informed; they play vital roles in creating the overall image of the school. The same holds true for students and how they are supposed to react to or act in certain situations. If they are informed and understand, they are more likely to be cooperative and less disruptive. Again, the media chosen for this internal group of publics will depend in great measure on the size of the school, frequency of meetings and the organizational structure.

Meeting the needs of the external publics has been discuss-

ed. There are two kinds of publics within the overall external forum: those who are positive and those who are negative. The lack of clear, concise information can result in more negative press than positive. In this instance, no news may very well be bad news. People will sometimes take on your public relations effort without being asked and may do more damage than the school might know. These people must be dealt with as well, personally if possible, and given correct information and a forum to be heard. Because the school attempts to deal with realities and establish relationships with people through public relations, these people cannot be ignored or discounted. Their voice will be heard regardless; it is to the school's advantage to manage these communicators, if at all possible. No public relations effort will solve all issues and satisfy everyone; it may take a period of time and a lot of effort. At certain points, the school must move on, concentrating not on the minority, but on the majority and create more positive ambassadors than negative.

Public Relations Calendar

One of the easiest ways to design a comprehensive public relations program is to *first* establish some broad-based needs; *secondly*, determine priorities and short-term objectives; *third*, assess the availability of personnel and resources to accomplish those objectives; and *fourth*, create a public relations calendar.

The calendar can take any format. What is more important is what appears on that calendar. The school should be able to glance at the entire school year calendar and determine through notations what public relations efforts are planned each month, who they are targeted to and the objective of each effort. With a calendar, it is simple to quickly determine what time periods are blank and what audiences or target groups are not being addressed. Should all the recruitment efforts be concentrated in October or November, or can something be done in March and April to either reinforce earlier efforts or give recruitment one more boost? A quick glance at the calendar will determine where the effort is now placed.

The benefits of a calendar include having everyone know what they must do and when, as well as what everyone else is doing. This alone has the effect of generating mutual respect and cooperation, excitement and creativity. It also gives others on the staff, parents and board members, an opportunity to contribute to certain efforts with their expertise, because they will know what the actual needs are or what the programs will be in any month. Some of the best volunteers will be recruited simply because they know what is going on.

The calendar should include dates, timelines and persons responsible. Again, this information aids coordination and accountability and, in some measure, forces completion of tasks because they are so specific.

The Public Relations Committee

One way of assuring the implementation of programs and activities in public relations is to establish a committee of interested people, with the skills and talents needed for such a program.

This committee would help to determine priorities for the year, schedules, types of media, objectives, timetables and areas of responsibility. The committee approach brings a broader dimension to the overall program and enhances its effectiveness. Members should be chosen on the basis of their ability to represent the best interests of the school and their ability to understand the total mission. Other talents could include, even on a consultative basis, people in the media, design and graphics work and the printing profession. Combined, the talents will enable the school to engage volunteer skills and expertise, without costly outlays of money.

Does your school need a public relations program? For those schools who are not sure the effort will be productive or worth the expense of time and effort, a simple exercise might help.

Are there t. ee unique or distinctive competencies at your school, that you would use to sell your school to a prospective parent, student or benefactor? Most schools could certainly answer yes. Here's the exercise:

1. Put in narrative form, three distinct programs, activities,

features or benefits of your institution that you are proud of and feel constitute part of the total package called your school. (These can include quality of staff, religious education program, buildings, computer literacy, language requirements, testing scores, etc.)

2. Next to those three items, illustrate how you publicize those three unique areas, now, in whatever media you might use. In other words, who knows about them and how do you tell others about them.
3. In a third column, especially if there are blanks for any of the items in the second column, illustrate what the school plans to do, in terms of publicity, to make these programs better known and understood.

The exercise will force most schools first of all to identify positive forces at work in the school, to take a look at how the school is using those forces to create an attractive and acceptable institution to the public, and to take specific action steps to make these features better known. If all is right in these three areas, it can be assumed that an active public relations program is in place and that it would be easy to continue to build greater awareness. If there are some gaps, either in identifying three unique or positive things going on or in marketing these positive forces, the exercise will clearly show the need to concentrate a bit on public relations. If the school cannot identify positive forces, it can be assumed that the publics out there also know little or nothing about the institution. A public relations effort becomes a must.

Public relations is a discipline and skill foreign to many involved with Catholic schools. The need was never there historically. The terms and gimmicks may not seem acceptable because of their secular overtones. New skills are needed for effective public relations. The saving feature is that all Catholic schools do public relations in one form or another. By establishing formal goals and objectives and a program, the administration is able to manage, control and enhance these efforts, setting the stage for more effective resource development and the ultimate accomplishment of the mission and destiny of the school. The techniques and skills needed for all that public relations entails are available to schools,

in books and periodicals, seminars and conferences, and locally in the skills possessed by parents, alumni, students and friends of the institution. Public relations efforts present other opportunities for involving people with particular skills and talents in the mission of the school.

Summary

1. Public relations, or communicating with people, is a total institutional priority aimed at establishing relationships for involvement and investment.
2. Every person in a school—from administrator, to teacher, to support staff to students—is a public relations person, who either enhances the image and acceptability of the school or detracts from it.
3. P.R. objectives differ and require different strategies and modes. Objectives for P.R. are to educate, to build a better image, to make people aware, or to get people to respond in some way.
4. A properly organized P.R. program defines its various audiences, what the effort should accomplish with that audience, and selects the variety of programs, media and activities needed to get the job done.
5. Every school can identify at least 40 different publics within its community. These diverse groups or certain segments of the groups will need frequent contacts, formal and informal, but as personal an effort as possible.
6. Effective P.R. deals with the central core of a school's publics or those closest to the school, then reaches out to more diverse and distant publics. Concentration of effort is given to "sold customers" and keeping them sold. A school cannot attempt to be all things to all people.
7. In-house P.R. is often as important as external P.R. Faculty, staff and students usually create and convey the fundamental image of the school to the general public. They must be kept informed, kept positive and thinking and acting with enthusiasm for the school.
8. A P.R. calendar is an effective tool for organizing a yearly program of objectives, as well as activities designed for recruitment of parents and students, selling the school

to its publics and creating an image for donors and investors.

9. A P.R. committee assures the school of a creative program and a process for implementation and monitoring of efforts.
10. Assessing the need for a school P.R. program depends on the negative and positive forces at work. An effective communication system emphasizes and sells the good and deals courageously with the negative.

3. FINANCIAL RESOURCE DEVELOPMENT

A systematic review of the total school, focusing on the quality of the product, the business management practices and its public relations practices, illustrates strengths, weaknesses, needs and desires. As those items are sorted out into goals and objectives to be attained, it becomes apparent that there are opportunities for growth for the institution, both in terms of human and financial opportunities.

Every school or parish strength is a positive force and that force can grow to something even more positive. A negative or weakness becomes an opportunity for growth: a place for the institution to focus some attention or resource. These negatives, within the concept of development, are *never* viewed as problems, but as challenges and opportunities. Dreams and "what ifs" also will emerge from the review and planning process. Dreams for new equipment, larger or new facilities, the ability to do more in the area of student assistance or faculty inservice or benefits. What if . . . the school could offer 50 scholarships, re-equip the science labs, offer three foreign languages rather than one? These all become opportunities for the school or parish to grow.

A *resource development program* becomes a natural consequence of the overall planning process. It should also be understood that if there is movement in the school or parish in terms of planning, marketing and public relations, there also will be a variety of *responses*. These responses will produce more personal involvement and more financial investments. The school or parish will appear to be more attractive, more desirable, more of a home or organization to be a part of, to give of one's time and one's investment. The

institution in this instance has put itself in a *responsive* position, a *receptive* attitude, to people who want to fulfill their needs by giving of their time and treasures.

The *resource* program creates a whole catalog of varied opportunities for people to respond to. It is the creative and exciting school and parish that can develop this catalog or shopping list of opportunities into a full program of development—creativity in the sense of being able to see needs, things, programs, buildings, in such a way that they become just what prospective investors want and need to fulfill their needs for growth, pride, prestige, success or a name in the school or parish community. The catalog also creates a great deal of excitement within the organization as the pastoral team, department heads and faculty members see not only their needs, but a clear and concise method or process for getting some of these needs fulfilled. The resource program forces a school or parish to design a specific plan for securing funds or human resources.

Essentials for a Good Resource Development Program

There are several basic essentials to organizing a good resource development program:

1. A Comprehensive Case Statement on the Institution.—This is a collection of data which details at great length where the institution has come from (historical overview), where the institution is today (enrollment, staffing, curriculum), and where the institution would like to be in the future (long-range plans, development needs). The case statement creates a *cause* for people to support, for businesses and corporations, foundations, and major donors to respond to. It is a selling tool. From the comprehensive statement will come smaller or more specific case statements that will act as tools for specific campaigns or development efforts (capital effort, endowment, planned giving, foundation proposals). All of the material generated flows from the mission of the school, its current strengths and desires for the future.

2. Blue Ribbon, Development Committee or Advisory Group.— It is necessary from the very beginning of such a development program to have a wide spectrum of expertise to depend upon, if the program is to meet its targets and goals. This group of men and women will constitute both the brain-trust for the plans, and the doers and influencers for all that is to result. The people chosen for this group are the most influential and affluent people the organization can gather; they are selected very carefully, after considerable research, trained for their responsibilities and continually serviced as the program moves along.

   It is very important that the school or parish have a clear picture of what is expected of each member of the group and why that person was selected, and also a clear definition of the expectations of the group as a whole. Since this committee or group differs from any other group experienced by the institution, its purpose and functions must be clear to the entire planning and development effort and team that is putting the program together. Smaller is better in this instance; membership should be limited in terms of years, so that through rotation, new ideas and programs are generated and the group functions from the point of development and creativity instead of politics and self-fulfillment. Subcommittees or ad hoc groups may be established for specific tasks within the overall plan, enlisting additional members if needed. The ad hoc group also should have a limited life and be terminated when the project is complete, so that the group does not develop into one that needs more servicing than it gives to the institution.
3. An Effective Communication Process.—Based on the earlier discussion of the role of a public relations program for the school or parish, it is evident that the institution needs to communicate what it is, what it is doing, how people are benefiting from the service and what needs to be done in the future. This can be done through newsletters, principal's bulletins, brochures and the use of various other types of media, but it must be done.

   Communication keeps people informed; from that in-

formation comes interest; from interest comes involvement. Some form of talking and sharing with people the goals and objectives,hopes and dreams, must be done if the institution is to reach its destiny and do the things it plans.

Whatever form of communication is selected, it should also be kept in mind that an institution such as a school or parish, must direct those efforts to *segments* of the population, if the overall process is to reach people effectively. The school or parish must communicate with the elderly, the widowed, young families with children, the single adult, the teenager, the alumni of the 40's and the alumni of the 70's, females and males. The process calls for not only a variety of media, but also specifically-directed media. No one public relations package, however perfect, will do a job of this scope; segmentation must be the rule; frequency, consistency and professionalism, the style and flow.

4. Prospect/Donor Data System.—In order to attract people to our institution and keep them interested, and in order to attract more individuals and resources, it is necessary to know and understand our prospects (constituency or consumers) and those who now support the organization (parishioners, parents, past parents, alumni and friends). The research and data collection on these individuals tells the institution how these people relate to the school or parish, why they stay with it, and what they might represent to the school or parish in terms of their ability to meet human and financial needs.

There is a reluctance on the part of many pastors and school personnel to maintain a data file on people, let alone a consistent and accurate record of what these resources now contribute, or have over the years, in the offertory, fund-raising events, volunteer time, committee or board work. Even with those people who now do the most for the institution, often no records are kept, making it impossible for a new pastor or new principal to go to any one source and find out who the best givers are and who the best workers are or were. This handicaps a new administration and often leaves very good and

generous people ignored for long periods of time until the new people get around to finding out who they might be.

Each prospect, donor, volunteer, or parishioner should have a data card on file in a central location, including as much information as possible: past and current giving pattern; occupation or position and where the person works; other relatives or children who have gone through the school or parish; interests; hobbies; and sphere of influence or affluence. A pastor looking for investment advice should know where to look and who to call on; a school interested in improving the library should be able to find someone interested in reading or teaching good reading habits to young children. The more information the better. This data will allow the school and pastor to *match* donor with institutional need and allow the organization to make a more direct and personal contact, rather than an informal appeal for support. No administrator can remember all the bits of information about people, especially when dealing with such large numbers; the data card does the remembering and that data grows in time and becomes a source of real development.

There are elaborate computer program systems for recording data. The important consideration is the ease with which the data is recorded, the accessibility to that data in various forms, the ability of the institution to be able to look at that data creatively and do something with it.

5. Catalog of Investment Options/Opportunities.—The catalog was discussed earlier in relation to public relations. It basically is our shopping list of needs. Each need is described on a separate sheet of paper, outlining exactly what it is—piece of equipment or program or service—what it will do for the overall program of the school or parish, how it will impact on the goals of the institution, what it costs for one-half the package or the entire package, to service and maintain for one year or long term, what it would take to endow the program, etc.

This shopping list can be generated from the planning process, a review of the budget requests from various

departments, from the dream or wish list (what if . . .list). In some cases, they will be budget items that might appeal to some donor or prospect; in other cases, they might be equipment needs, buildings and grounds improvements, scholarship assistance, teacher inservice or benefits. The collection of needs organized into a notebook becomes a tool to use when talking with people. What might be of interest to one person, might not interest the other, but the catalog has something for everyone.

The administrator should match the donor with a particular need item, based on the data known about the prospect, so data is vitally important. Once the match is made, a meeting takes place in which the particular item chosen for this prospect is discussed and, it is hoped, "sold." Once chosen, the gift should be publicized and the donor thanked, and a new shopping list item inserted in the catalog to take its place.

6. Donor Records, Recognition and Reports.—Data cards should contain information about contributions made by individuals, either of time or funds. These records should be adequate and up to date at all times. Schools and parishes may choose to keep this giving data separate from the general data card, which might be used more freely by committees and other groups in search of volunteers or other group members. What matters is accuracy, with details as to date of gift, amount, purpose of the gift, any billing dates for pledges, etc.

Recognition is a key to maintaining on-going relationships with people, either for their time or funds. An immediate thank-you card or short note, personally written or signed by the administrator, should go to every donor and volunteer. In large schools or parishes, some discretion may be necessary as to how elaborate a thank-you is necessary for various levels of gift giving; some believe anything under $20 should not be acknowledged personally, but through a general thank-you. That decision will have to be made locally. A $1 alumni gift from a graduate just out of school may deserve a personal note because of the loyalty and concern the gift expresses.

Other recognition might include end-of-the-year parties for all donors or workers, special tickets to plays and concerts, listings in annual reports or parish bulletins, plaques or small gifts from time to time. A donor can never be over-thanked! Do it once and do it again. Donors had needs fulfilled by donating; it is good to remind them of what they did and how they benefited.

There also is a need to report back to people on the results of a campaign or effort. Those who volunteered to stuff envelopes for a large alumni mailing should be told what that mailing brought in return, the amount of money it generated, number of people who attended an affair or other concrete results. Such reporting makes a menial task consequently important. Donors to building campaigns or remodeling programs should be informed on a timely basis as to the progress of that work, relating their gift to making it all possible. Again, we can never over-report or over-inform our constituency.

7. Target Segmentation Program.—The successful development program involves various programs and activities, addressed to various segments of publics. The institution may want a church improvement program, school fundraising effort, endowment or planned-giving effort, and they all can be done, if the needs are addressed to different segments of the community. The elderly can be singled out for a certain program; school families can be asked to do other programs. Not all groups will receive all appeals or target programs. The effectiveness comes in the program design and in the audience or market selected.

   No school or parish will be able to do all things well, due to lack of personnel or resources. The school or parish should select carefully what it can and will be able to do, set the process in motion and monitor the progress.

Repeat what works, elaborate or expand from that point. Someone must be responsible for development to happen, even given all the essentials and all the good intentions in the world. Someone has to be in charge. This does not mean that a school or parish necessarily has to hire a high-priced

professional to get the tasks done. Very effective development is being done by principals and pastors. Other development office combinations include a volunteer "executive secretary" to coordinate the program, a faculty member freed for part of the day, an active and working development committee, working with a secretary or volunteer, and/or a full-time or part-time development director. In some cases, one director might work for several institutions; schools or parishes might combine resources and hire a professional to coordinate their efforts. The caution is not to overextend the talents and time of the individuals put in charge of the project. Many people have many skills; very few have all skills for a program as broad in scope as development. Hiring or assigning personnel to this program should be done in light of specific goals and objectives—short-term and long-term—and not on the basis of a model job description. The school or parish should recruit the personnel needed for its program; as the program develops, so can the director or coordinator. Once appointed, the expert should be given the authority and responsibility, freedom and resources to do the job.

Fund-Raising

Over the years, fund-raising has become a necessity for more and more schools and parishes, as offertory collections, tuition and fee structures do not provide enough to maintain them. The financing system now seems to be a combination of parish subsidy (to elementary and secondary schools), tuition and fees (for most schools) and fund-raising events, as annual sources of operating revenues. Fund-raising activities, however cyclical or time and energy consuming, have become a way of life for most schools and parishes. By its very nature, the fund-raiser is short-lived, must be repeated and usually serves as an "easier" solution to a crisis or revenue short-fall. They began as extraordinary events and are now commonplace. They will be a part of school and parish finances until there is a greater emphasis on stewardship, tithing and convincing people of the real costs and benefits of the services being rendered by our schools and parishes.

Fund-raising seems to cover a broad range of activities and programs, some more successful than others. Each institution selects the variety and frequency of these programs. No one has successfully tabulated all the kinds of fund-raisers created over the years, and it would be virtually impossible to list them. They are important events and history will record that many schools and parishes survived this way. They have become less and less attractive because of the need to exceed last year's goal and the need to come up with some new approach or method, new volunteers or chairpersons and committees to both design the program and raise the funds.

Traditional fund-raisers include bingo, raffles, auctions, festivals and sales (of everything and anything imaginable). The people who usually support these projects are the parents and students, alumni and friends of the institution. These people work hard and long hours to set up the programs and make them successful, doing it year after year.

Effective fund-raising depends on planning, organization, volunteers and target audiences. In order to set all this in place, it becomes increasingly necessary for a parish or school to establish a *fund-raising calendar*. This *calendar*, from the very outset of the school year or parish year, dates the fund-raising event, its purpose, what it is, what the funds will be used for, who is in charge and who is the *target* market. All fund-raisers should not be directed to the same markets. For instance, if St. John Elementary School has 10 fund-raisers over the course of a school term directed toward parents, some analysis should be made as to whether there are alternatives to this intense schedule, the actual results of these 10 small events over one, and whether or not there are other audiences to appeal to. The calendar forces some institutions to re-examine their whole financing structure. It makes them look at each fund-raising event and its results, separately and in relation to each other. Can the goals and objectives of the institution be enhanced by consolidating certain events for either larger, more substantial revenues or by an entirely different approach to revenue raising? Many school parent groups are beginning to say no to fund-raisers in deference to added tuition, increased offertory obligations or more direct appeals for revenues.

Successful fund-raisers depend on enthusiastic volunteers and organization. The proper person or committee should be selected far in advance of the actual event so that sufficient time is available for adequate planning and structure. Timing is important and so is the event. They should be structured from the very beginning as fund-raisers, organized for maximum return to the institution. Many fund-raisers collect large sums of money, involve hundreds of people and hours of time, for a net return of no financial consequence to the school or parish. If the school is going to mobilize the entire student body, then the return ought to be commensurate with the hours given to the project. If a small club wants to raise enough for some small equipment or a field trip, the effort should be commensurate. Organizations should stay away from mass mailings and mass appeals in every effort. The rule is segmentation and targeting.

Institutions, which are taking a more forward-looking approach to this whole problem of the bigger-and-better fund-raiser year after year, are moving into *annual appeals* or annual giving efforts, which will be discussed later. The annual appeal gets out of the raffles/sales approach into more stewardship fund-raising and for that benefit, it is worth the effort for schools and parishes to explore.

Annual Giving

Annual giving differs from fund-raising in that it builds a long-term relationship: donors to institution. It is an annual appeal that appears to be better organized, more serious in its intent, and to some has much more dignity than sales and raffles.

The annual appeal is usually the focal point for all fund-raising for that institution; it involves the entire community and usually meets all of the budget revenue needs for the current year. A concentrated effort is made by everyone, in an organized fashion, and with significant returns.

The appeal is usually a combination of a mail package and a follow-up phone call, or in some instances, personal visits or personal letters. The mail package contains a letter from the administrator announcing the appeal and its goal for the

year, describing what the funds will be used for and seeking everyone's participation. A few weeks later the letter is followed up by an organized phone-a-thon effort to reach all of the prospects who have not as yet responded, usually resulting in three times as many gifts as the mails generated. These phone-calling sessions are highly organized, with parents calling parents, alumni calling fellow classmates, friends calling friends in comparable professions or careers. The gifts can be immediate gifts or the donor may be given the balance of the school term to complete a pledge. Immediate verification of the gift is sent by the caller to the giver, along with a thank-you. For pledges, periodic billings are sent as both reminders of the pledge and an additional thank-you.

The annual appeals also are segmented: one for the parents; one for the alumni; one for a corporate or friends category. Although the theme and need and use of funds may be the same this year for all categories, the mailing pieces and organizational structure may differ for alumni and parents, etc. Parents will react differently from alumni; the appeal ought to take that into account for better results.

Goal setting is usually made on the basis of budgetary needs and the fact that this is the major fund-raiser for the school. Annual appeals are well received if they can focus on specific needs such as new computers, scholarship assistance and renovation projects. There is a valid tendency on the part of givers to want to know specifically what their gifts will do as opposed to gifts made to "general" operations. This should not bother administrators in the sense that if the school is already giving financial assistance aid either in cash or through a work-study program, the annual appeal money

Many schools are developing annual appeals based on the difference between current tuition and the actual cost per pupil. This approach has a side benefit of educating parents to the real cost of education. The appeal basically asks parents for a tax-deductible gift of the difference in the two amounts. (The actual cost usually considers the salaries of the religious on the staff at comparable lay salary scales, the elimination of certain course fees and of fund-raising events, which this appeal is designed to replace.) The spread may be as much as 300-500 dollars per student. A determination will be made

as to what each parent will be asked for, either a full share or partial share or some basic minimal amount. Most parents respond favorably to this approach, especially if it will eliminate other appeals throughout the year. They also find it educational to know and understand the real costs and what the presence of the sisters, priests and brothers means in terms of cost reductions. Some parents actually resent receiving "scholarships" at the expense of subsistence type stipends being paid to religious. The mail appeal is then followed up by parents calling parents. As the program develops, the parents become more and more cooperative because they see that certain other less desirable options for revenue raising are being replaced.

Past Parents and Alumni Associations

Schools should not forget the giving potential of past parents. They have been with the school several years, depending on the number of school-age children. They know and understand the school, have participated in every event, PTA meetings, fund-raisers and have had a lot of personal dedication to the school. As their children graduate and leave the school, many parents leave with them and dedicate their efforts to colleges or universities. Many, on the other hand, remain loyal to the school, if given an opportunity. Parents of graduates should be maintained on the school's mailing list; they should receive school newsletters and appeals, invitations to events, raffle tickets, etc., until they themselves request differently. They are satisfied customers. They love the school, they love what was done for their children, and they proudly support it. These are reasons that the school should maintain relationships with them and continue to ask them to be a part of what they loved and dedicated themselves to for so long.

Alumni are basically the same type of group. They represent the proud product of all that the school does; their success as young men and women is the school's success. Where they go after their education and formation is to the school's credit and gives it reason to continue. They are testimony

to good programs and reasons for continued existence. The school should learn about alumni successes and communicate them to parents and students, both as good public relations gestures and to help recruitment. Organized alumni groups in both elementary and secondary schools represent a strong force for selling the institution to others, reinforcing what the school is trying to do by way of mission, and also as a source of financial support. The better organized the alumni, the greater will be the results. A board of alumni established with committees, activities and events would help to get as many graduates involved as possible. There should be a special communication piece for them or directed to them, and at least one opportunity for them to make a financial contribution. An alumni appeal program will come as no surprise to alumni. The level of success in terms of revenue dollars will depend on how the appeal is marketed, its purpose and the degree of alumni loyalty.

A certain percentage, initially perhaps very small, will contribute to the annual appeal from the past parent and alumni group. A small percentage is a good beginning. The percentage of participation will grow and there will be response in other ways as well, such as attendance at games, dances, and events. As in all such programs, there is a building that takes place over the years that will result in new human and financial resources.

Planned Giving

A parish or school planned giving program is both a service and a potential resource. The program encourages people to make out a will and an estate plan (covering premature death, disability, long-term sickness, retirement needs and care for dependents) and to include the school and/or parish in those plans.

Stewardship of goods is the theory. Teaching the concept and offering estate planning services will result in more and more estate gifts. Over 5 billion dollars is left annually in estates to charitable organizations. The more people understand how to take care of their estate needs and how they can also make charitable gifts, the greater will be the parish

or school's opportunity for benefits.

Every school and parish can benefit from planned giving, along with all other forms of resource development. For those who give of their time and resources during life, an opportunity to culminate their life and giving at death becomes a real testimony to their church.

This is one program best handled by outside experts, who make careers of advising people on estate planning. A planned giving committee is recommended to organize and implement the program, instead of the principal or pastor.

There are seven basic steps to this promotional effort:

1. Read material on the subject to become familiar with the basic terms. Banks and insurance companies offer free booklets. Local colleges, hospitals or other non-profit groups also have helpful material.
2. Begin asking people to make out their wills. Without a will, people cannot leave money in their estate plans for charity. Simple little statements in parish bulletins or newsletters will begin the education process.
3. Offer planned giving seminars and will clinics. This professional service by the school or parish can be given by bankers, attorneys and estate planning experts. If the school or parish can show how to plan, they will be remembered in those plans.
4. Send mailings on various topics relative to good estate planning. These flyers or brochures can be purchased for a mass mailing to all parish families or alumni lists. The mailing should include a letter from the administrator or pastor, a brochure and a reply card, if more information is needed. It is often best to offer another free booklet in each mailing. These mailings can be annual or quarterly, depending upon resources and time.
5. Form a planned giving committee. This group should design the overall program and implement each step. Included on the committee are experts in estate planning, probate attorneys, bankers and others with some time to make things happen.
6. Begin a program of personal contacts. The best prospects for a will gift are current and past donors, those who attend the will clinics and those who ask for more infor-

mation. Members of the committee and the administrator or pastor should all begin talking to people about charitable giving through their wills.

The final step, number 7, suggests being patient. It takes eight to 12 months for a person to plan and write a will. Repeat what works.

Capital Campaigns

People are motivated to give major gifts to capital efforts because the projects represent opportunities to memorialize oneself or one's family.

Schools and parishes find little difficulty in getting donors for capital campaigns that are organized properly and worked at consistently and diligently. A good case statement and volunteer leadership, along with properly motivated donors, will have results.

Capital campaigns may be conducted along with other annual giving programs. They can be massive campaigns or mini-campaigns. People will respond differently to each opportunity, but should be given a chance to participate, if the needs exist.

A professional feasibility study can analyze the need for capital, the possible acceptance by the school or parish leadership of such an effort, the possibililty of raising the stated goal and the potential for major donors and helpers in the solicitation process. It is highly recommended to engage experienced fund-raising counsel for such campaigns.

A case statement, a pledge card and payment plan, a campaign organization and volunteers, an overall timetable and solicitation process are all basic ingredients for a successful appeal.

Endowment

As another resource and opportunity, endowment giving programs are very attractive.

An endowment is a pool of money which is set aside almost perpetually and only the net interest earned on those funds becomes available for school or parish use. In concept, it offers the institution a new, continuous and

annual source of revenue. The larger the endowment, the greater the annual revenue.

Each school or parish designs its fund differently, with income being used for several different purposes or confined to a specific need (scholarship, operations, capital, teacher benefits). Guidelines for how the funds will be managed and distributed, and duties of the trustees and endowment board are all contained in the legal trust agreement established initially. (The endowment fund need not be separately incorporated; a trust agreement is sufficient to control the affairs of the fund without a lot of legal entanglements with the State and Internal Revenue Service.) Gifts to a school or parish endowment fund are tax deductible, as any other contribution, so a separate exemption is not needed.

A primary concern in setting up such a fund is or should be the ability to give time and energy to raising funds to make the endowment large enough to generate significant income. The endowment board has little or no business to conduct without funds. This also means that board members are selected on the basis of their ability to give and to attract dollars for the institution. This kind of person will be harder to find, but will produce more in the long run.

Many schools and parishes are slowly building endowments by taking a percentage of current fund-raisers and revenues and setting them aside for endowment. This approach is highly recommended when a more formal effort might not be possible. Concerted efforts, on the other hand, produce greater results. To build an endowment quickly, a campaign, which identifies and solicits major donors for major gifts, should be structured so that monies begin earning interest and that interest immediately starts to benefit the school. This approach is both very productive in terms of dollars and more acceptable because it works today as well as building for the future.

Present and past donors are the best prospects for endowment. They can quickly see the long-term advantages to the school of their gift. It is an attractive option for them because it perpetuates their giving and generosity, long after they are no longer a part of the institutional scene.

Summary

1. A systematic review of an institution identifies strengths and weaknesses and creates opportunities for planning, as well as specific action steps.
2. In a resource development program, positive and negative forces become opportunities for expending human and financial resources. Problems become challenges and means to progress in a development mode. Needs of all kinds become opportunities for prospective investors.
3. A resource development program is a component of planning, for it assures a systematic approach to attaining the resources needed to attain institutional goals.
4. A Good resource development program requires: a case statement which clearly outlines a cause or reason for supporting the institution to attact investors; quality leadership, expertise and skills within a well-developed committee to create and implement the development program; and human resources with specific skills, who can be recruited for clearly-stated objectives.
5. People desire consistent communication from the school to maintain their interest and to encourage their involvement of time, talent or finances.
6. Knowing and understanding the needs and interests of a prospective donor and offering that donor an opportunity to fulfill that need usually leads to mutual satisfaction. Research and a donor data system builds the proper profile on individuals and facilitates the process of matching donor needs to institutional goals and objectives.
7. Institutional needs can be matched with donor needs through a catalog of gift options. This "shopping list" presents clearly achievable goals to a donor and is an effective means of involving people in the institution's future.
8. Adequate donor records, recognition and reporting to donors assures donor loyalty and at the same time, builds a climate for even greater levels of commitment.
9. Prospects and donors differ in their personal needs and relationships to an institution. Programs and activities designed for a segment of a school's public results in a

greater response level than an informal program directed at a larger public.

10. Fund-raising programs are cyclical and unpredictable and depend on large numbers of volunteers to be successful. They are compatible with development efforts, but are only part of the effort.
11. Effective fund-raising depends on leadership, planning and coordination. A fund-raising calendar will assure a properly designed and targeted program.
12. Annual appeals or an annual support program, involving parents, students, alumni and the civic community, usually results in a greater financial return to the school, and are generally better received than the traditional "merchandising" fund-raising efforts.
13. Annual giving builds long-term relationships with donors, greater involvement and an increase in the quality and quantity of gifts.
14. Annual giving programs involve the entire institution and its donor community in a well-orchestrated, professional giving program.
15. All segments of a school community are targeted for the annual appeal, but the appeal strategies and goals and options may differ.
16. Past parents and alumni associations, when viewed as part of a school's on-going educational ministry (adult education), when properly motivated and involved, will continue to be a support group for the school in terms of both human and financial resources.
17. Planned giving programs, offering professional advice in the area of estate planning, show adults how effective financial planning will provide for retirement, education of their children, disability, loss of wage earner, etc., while creating larger estates and opportunities to contribute to charitable causes as well as meeting other obligations.
18. Major gifts or gifts to build buildings, or replace major equipment come usually from previous donors and donors who see in this campaign opportunities to be honored or memorialized in a significant way.
19. Effective capital campaigns depend on a feasibility study to determine the potential to raise funds, a leadership

team of donors and solicitors and a case which is clearly understood and accepted by the school's public.

20. Endowment funds generate interest every year, which becomes an alternate source of perpetual income.
21. These funds can only be raised by schools who demonstrate *stability*, are in a long-range planning mode and have goals and objectives for the future.

4. STUDENT RECRUITMENT

Programs and activities which attract students and parents to become "consumers" or users of our products and services are necessary to the future viability of our schools. An aggressive recruitment program becomes crucial in attracting the enrollments needed to make schools economically and academically stable.

Historically, Catholic schools did not have enrollment problems, since it was a "moral obligation" to send Catholic children to Catholic schools. The message from the pulpit was a forceful one and efficient in terms of keeping the schools filled with children. This method of recruitment prevailed until the 1960's when an entirely different posture became available: sending children to a Catholic school became a question of whether or not you wanted to, could afford it, or considered it valuable enough. With this new attitude came wholesale drops in enrollment, a basic lack of confidence in the schools and an evaluation that the benefit was not worth the price. During this time, little or nothing was said about Catholic schools to correct these perceptions, allowing negative perceptions to take over. People generally made up their own minds: parents on the basis of what they heard, thought they could afford, etc.; students on the basis of what others were doing and/or on the basis of what might be an easier school to attend, where their friends were going, a school with less religion, etc.

Administrators soon found that little or nothing was being said about the value and benefits of Catholic schools. No one was talking about their schools, making them appealing choices for both parents and students. School principals were now given a new task of "selling" their school programs to prospective "buyers" in the Catholic market. The idea of sell-

ing a school was new; parents did not need to be convinced in the past — although some sent their children to the schools for a variety of reasons, not necessarily out of conviction. Students and parents now had to be viewed as buyers of services.

"Selling" and regarding parents and students as "buyers" require new skills for the school staff. Communications, public relations, advertising, marketing skills became new terms for Catholic schools. Administrators had to learn these concepts from the secular marketplace and translate them into techniques and programs for their schools. Schools quickly learned that they had to begin talking about their programs and activities, what they could do for students, how students would be able to succeed in further studies and in life careers, what values were being taught that would uphold the Catholic traditions of their parents and the church. The needs for such programs and activities introduced a whole new mind-set and atmosphere for the school. The school had to move out of itself, go out to the marketplace and sell its products and services, and their benefits, much the same as a vendor would. Those who managed to exercise such skills early maintained enrollments; those schools adopting this new approach are seeing increasing enrollments as well as greater levels of parental participation. Schools that have not initiated such programs and activities could find their future jeopardized by the competition or by alternative educational opportunities.

Persuasive Techniques

Recruitment of parents and students has often been referred to as "consumer recruitment," since it basically involves using techniques that will *persuade* people to buy or consume a product or service. The techniques are similar to those used in business to sell products and services. A quick review of how the secular world persuades a consumer to make choices among products indicates a strategy that can easily be adapted by Catholic schools. There is no question that these techniques work. The issue is whether or not all of them can be used by Catholic

schools, which ones will be successful over others and whether there is a willingness on the part of schools to go public with their program with the same confidence a manufacturer uses in going public with a product.

These persuasive techniques should not be considered as slick, in the sense of covering up something or creating a need that is not there, just for the purpose of "making money," as Madison Avenue often is accused of doing. Nor are these techniques to be morally questionable, lacking credibility, making statements that are either untrue or blatant lies.

Successful recruitment techniques are based on reality—the quality of the product or service. The techniques also deal with perceptions—what people think about a product or service. The consideration of both issues becomes the *marketing tool* that will effectively sell the product.

Selling the Product/Service

Before discussing various programs and activities relative to student and parent recruitment, it might be useful to look at the actual product or service being marketed, what it is that is actually being sold.

In evaluating Catholic schools, prospective buyers are interested in three essential ingredients: 1) quality of program; 2) discipline or academic atmosphere; and 3) attractiveness. A school that can demonstrate these ingredients is more likely to end up with the number and quality of students it needs and wants, parental support and community response.

1. Quality of Program.—It is important to restate the original premise that any recruitment effort or selling program can only be effective where there is a quality product to sell. An institution cannot sell what it does not have to offer. No Madison Avenue techniques will endure in the long run by trying to cover up for the lack of quality. Quality in Catholic schools means a number of things: testing scores; ability of students to enter college successfully; national rankings; merit scholarship winners; scholarship awards in general; special programs for the slow learner, disadvantaged student or the academically superior student; student activities, accessibility; and

teacher interest in the lives of the students. Parents want to have demonstrated to them that their investment in their children *in their school* will produce students qualified to find jobs or go on to higher studies, to lead productive and fruitful lives. If the message of such quality is heard loud and clear, the school has taken the most important step in the recruitment process. The quality of the program will do more than anything else to attract students and parents.

It is important for schools to realize that quality religious formation is often coupled with quality academic formation. Parents are looking for clear evidence of a religious program strong in traditional values. Frequent opportunities for the sacraments, retreats, personal guidance, all are part of this program. It is still a valid premise for parents to send their children to Catholic schools for religious formation. Where such a program is absent or the quality questionable, the overall quality of the school is in question.

2. Discipline/Atmosphere.—Research indicates that one of the reasons parents send their children to Catholic schools is for the discipline— which is now being more broadly defined to include the general atmosphere under which learning takes place. Parents equate discipline with homework, extra assignments or projects, strict teachers, quiet and orderly classrooms, clean and attractive buildings and grounds. Good management of the school in general, and of the classroom in particular, means discipline.

   Parents support schools that demonstrate an ability to be organized, have direction and seriousness of purpose, are demanding of their staff and students, and creative in the opportunities they offer for the broadest possible education. They are willing to pay the price for a discipline that will train and form their children into likely candidates for academic awards and scholarships, qualifying for challenging college and university studies.

   Organization to some parents also means they can call the school with questions about their children, and that the administration and staff is willing and ready to call

them back with the answers. It means that business questions about their financial obligations get answered. It means that transcripts, letters of recommendation, etc. are handled with professionalism and on time.

For some parents, the condition of the classrooms, halls, front of the building, means organization or chaos (translated: lack of discipline or serious academic work). Littered halls or classrooms to some people—parents and the supporting community in general—speak very loudly about quality.

To understand this perception and to deal with the order and organization of the school in these areas is to address the second most important part of the recruitment process.

No discussion has surfaced yet here about the question of price in the recruitment process, because research has indicated that price is relative in terms of quality. That is not to say that the tuition and fees, fund-raising obligations and other financial considerations are not a part of the school selection process. What is being underscored is that if a school is perceived as having a quality academic and religious formation program, order and discipline, the price for that benefit is less a consideration than it is in the absence of such quality. A consumer will pay a higher price for a quality item than a lower price for a "sale" item that just does not bear the test of quality. Many elementary and secondary Catholic schools across the country, that are charging tuitions beyond the local averages, are not having enrollment problems, have waiting lists and stringent enrollment procedures, because *they stand for quality*.

3. Attractiveness.—The quality of attractiveness contains many of the ingredients spoken of earlier in the discussion of quality and discipline. It is more of an overall atmosphere the school either possesses or does not. It is that inherent quality that appeals to young people, makes parents very comfortable, and the community very receptive.

Attractiveness can be defined as open, happy, exciting, neat, caring, creative and result-oriented. It permeates

the building, the classrooms, the gym, the offices, every person associated with the school.

For young people, it's the place to be, the place to be associated with, a place to spend a lot of personal and free time, a place to be proud of, both on and off campus.

For parents, it's a place that is caring for their children, where learning is taking place, where growing children can receive the same love and care as their parents give; where direction and challenge are given.

The school becomes a place that younger brothers and sisters want to visit, attend a sports event, play or concert.

The school is attractive when investors know the importance of helping out, by giving of time and money and other types of support. The school becomes a vital community asset and is adopted by the broader community as important for its citizens.

The Consumer Audience

In designing programs that will attract students and parents, specific programs should be created for specific audiences. What will appeal to one segment of the consumer population may not appeal to another.

Here again, the school must rely on good marketing principles and target its efforts to segments of its consumers. For example, parents of pre-schoolers might need a concerted effort to make them feel welcome in the Catholic school system. Research indicates that students who start in a Catholic school generally continue on through high school in the system. An appropriate effort directed to these pre-school parents will ensure elementary and secondary school enrollments. On the other hand, a secondary school might determine that the students to talk to about enrolling in a Catholic high school are the sixth, seventh and eighth graders in the grade schools and not just the eighth graders. For each grade level in this case, a different strategy or activity might be necessary.

The smaller the segment, the better the results. In reviewing the various audiences, it might be determined that there are several segments to address, in which case several recruit-

ment activities should be designed.

A brief summary of recruitment segments might include:

- —pre-school parents
- —PSR students
- —PSR parents
- —5th, 6th, 7th, 8th graders
- —public school students: high school, grade school
- —newcomers (to the parish)
- —Baptism classes/newly baptized
- —grade school parents
- —high school parents
- —parish by parish segments
- —Confirmation classes
- —alumni
- —marriage classes/pre-Cana

The task at hand is to define the audience that should or could be appealed to in a recruitment effort and then design a program specifically for that audience. The program, in all cases, should include an attractive flyer of some sort that details a very clear profile of the school and its ability to deliver quality. This will be discussed more at length later.

Recruitment Activities and Programs

Concerted recruitment activities should include the administration, teaching staff, the students and parents. The task should not be confined to the principals, although they often are responsible for organizing and implementing the overall program, at least in terms of time allocation, personnel and budgetary needs.

A dedicated teacher is as good a recruiter as the principal, and in some cases better, because the teacher can operate with a little more freedom, flair and informality. Students, along with teachers, make effective combinations for presenting the school. Selection and training of both teacher and student is essential, so that questions of concern to students and parents can be properly handled and the right information given. Parents talking to parents also is an effective method of recruitment, since the setting involves one satisfied consumer talking with a potential buyer. The parent is in a better position to answer those questions of concern to other parents.

Recruitment programs ought to be exciting, creative and *memorable*. Recitation of facts, discussion of the curriculum, course requirements, dress code and bus transportation, although essential, take away valuable time from the school's effort to *impress* or *persuade*. The time with parents and students would be better spent making impressions; details about busing, finances, courses, etc. can easily be handled through a fact sheet or packet of materials that can be given to every prospective consumer.

Here are some examples of *memorable* recruitment efforts. A high school French teacher gives the sixth graders their first French lesson, during which they are taught their names, name of their school and several ordinary words in French. A chemistry teacher creates a little smoke or loud noise in the classroom, demonstrating a bad mixture of chemicals. A local high school band practices during the last period of the day at the local grade school and asks those taking music lessons to join in the practice. A home economics class provides refreshments, pizzas to visiting students. A school-color bib is sent to each newborn in the parish. Newcomers to the parish are welcomed monthly at mass or served coffee and donuts after the mass in the school gym; they also are given a packet of materials about the parish and the school. Alumni window decals, school decals or book covers are distributed to grade school students.

Many of these types of programs will leave more long-lasting impressions on parents and students alike than a typical lecture-type presentation. Engaging the student or parent in the process is the key. It helps to develop a relationship with the school. The free sample, test drive, 10-day free trial, are similar techniques used by business to involve the consumer in the purchase process. Students and parents need to "try it on" to see how it fits. Bring them into the school or take the school to them, but give them a chance to try it on.

The various types of recruitment programs are too numerous to mention or list in any one place. Once the audience or strategy has been determined, the local school is in the best position to determine the actual format. There are two principal areas that should receive focus in the pro-

cess: the home and the parish. Parents need to become involved in the effort, either through visits to the home or getting parents to the school. The parish can also be a central point for recruitment, for it provides a stable setting for many programs that will result in new students for either the grade or local high school. These programs involve youth groups, school service projects, exhibits and displays, family dinners, honors programs, etc. Keeping these two focal points in mind, again the activities and actual programs can be created locally.

Other efforts might include some of the following:

- Open house
- High school night; college night
- School picnics/hikes
- Grandparents' day
- Bring-a-friend day, sports event, culture/music event
- Teacher exchange day
- Student exchange
- Mini-class day for grade school students at high school
- Mini-day for pre-schoolers at grade school
- Coffees for parents (both grade and high school)
- Big-brother/big-sister day (younger siblings visit school)
- Book covers, pens/pencils, folders with school name
- Regular TV coverage, newspaper articles
- School newspaper exchange
- School/PTA news sent to all parishioners from time to time
- School news in parish bulletin
- Service days to elderly, hospitals, clean-up days, painting, planting trees and flowers, letters to civic leaders, community event
- Use of buildings and facilities by other agencies, community
- Free tickets to sporting/cultural events at high school
- Speech tournament, science fairs, open to all age brackets
- Pre-high school summer tutoring session for seventh graders
- Sports clinics: basketball, football, soccer, tennis, etc.
- Parish dinners, picnics in connection with open house

All these efforts might be suitable for various portions of the audiences within a parish grade school or secondary

school. They should be supported by attractive materials that can be given to each student and parent who attends. The names of prospective students and the names of parents also should be gathered for the record and these people thanked for coming to the scheduled event and kept up to date on school news and future events. Maintaining good records on those who are part of any recruitment effort and communicating with them makes them part of the program and maintains their enthusiasm and interest in the school. Periodic telephone calls by teachers or parents also helps to reinforce the interest in the school; letters of congratulations to students for academic success also are encouraging. Publishing honor rolls in parish bulletins and alumni news also is effective.

Recruitment Calendar

Maintaining the school as an attractive place for present and future students, for parents and investors, is a year-round task and involves a variety of activities to accomplish annual recruitment goals in terms of actual students, to maintain enrollments, and to generate additional parent and investor support.

A calendar, prepared with specific strategies, targets, timelines and persons responsible might be prepared early in the summer for the coming school term. Taking an ordinary school calendar, these items can be penciled in for greater flexibility. As one program is completed and evaluated, it may impact on other programs, which can readily be changed or enhanced for the coming month.

The calendar should include many of the public relations efforts not ordinarily associated with recruitment, but as can now be seen, are vital to the effort as well. More is better in this case, if directed to the proper audience. The only caution is that the total effort appears to be well orchestrated and organized, so that more does not appear to mean disorganized or splintered.

Student enrollment is essential to a school's viability; educated students and graduates are the *product* we produce: formed and trained in the image and likeness of God. Parents share in that responsibility and need to be a part of the pro-

cess from the very beginning. To get the job done properly, schools need the support of the community, people ready and willing to give of themselves and their resources to help schools achieve their goals. They, too, need to be part of the overall recruitment process.

Recruitment is good public relations, good management, quality academic and religious formation—the reason for Catholic schools. In that sense, every staff member is a recruiter. Every secretary, every custodian, coach, part-time associate is a recruiter. Each and every person must be convinced of the value of the school and their own work as part of the total effort. With such dedication and excitement over the school, that spirit will inspire, recruit, and involve people in the overall mission. They in turn will do their part: enroll as students, participate as parents, give as investors.

Summary

1. Parents and students want to know about the value and benefits of a Catholic education and be encouraged that their investment of their children and funds in Catholic education is a worthy one.
2. Moral persuasion is no longer a valid recruitment tool. An exciting and creative marketing and public relations program will be better received.
3. Since students play a major role in the selection of their schools or in continuing at those schools, marketing efforts should be directed to them as well as to parents.
4. Parents and students can be asked to be a part of the recruitment effort and generally provide a realistic service to the school in this regard.
5. Schools can learn from commercial product sales techniques in the art of packaging their schools for "buyers." Quality of product and dedicated service will sell itself.
6. Each school has a uniqueness to which their publics are likely to respond. This uniqueness, when clearly expressed and marketed to the public, usually results in a favorable response by those publics interested in that product.
7. Quality of product and service is more of a determining

factor than price. What a parent or student perceives as quality and attractiveness often comes before a consideration of such costs as tuition, fees, transportation, extensive homework or other demands.

8. Parents continue to seek evidence of the existence of traditional values at play in a school. Students are looking for modern and socially acceptable alternative educational forms. Recruitment programs take both into consideration in their overall presentation.
9. Attractiveness of the buildings and grounds, an atmosphere of caring and acceptance, excitement and creativity, a sense of belonging are all factors which tend to influence parents and students in deciding on a school.
10. Recruitment programs need to be geared to younger grade levels, be diverse, professional and frequent in terms of actual contact with prospective parents and students.
11. A recruitment calendar tells a school at a glance the levels of concentration, audiences, programs and activities, daily, weekly and monthly. It ensures a continuous effort toward recruiting consumers.

SUGGESTIONS FOR USING THIS BOOKLET

Orientation

Development and public relations will be primarily the responsibility of the administration of a Catholic school. The teacher will play an important part in a comprehensive development effort and will need a general knowledge of its components and how the teacher will be expected to participate. The strategies which follow emphasize the perspective of this overview, while providing options for a more specific focus.

EXTENDED FORMAT

OPTION A

Session 1: After reading the booklet, invite the development director of a Catholic school in the area to explain the essential components of the development program and how the program is being implemented.

Session 2: Divide the participants into small groups. Ask half of the groups to develop a public relations calendar for a Catholic school; ask the other groups to develop a recruitment calendar.

OPTION B

Use a variety of activities from the **Mix and Match** section below to comprise several sessions.

MIX AND MATCH

Step 1: Prayer.

Step 2: Openings—choose from among the following:

a. Write a brief description of the following terms: development, public relations, recruitment.

b. State briefly your present understanding of the difference between development and fund-raising.

c. Involve the group in naming three (3) elements of a school public relations program.

d. Predict items that would be included in a calendar of recruitment activities.

e. From your experience explain why a lack of quality education, unsound business practices and poor perceptions of a Catholic school would have a negative effect on the generation of human and financial resources for the school.

Step 3: Middle—choose from among the following:

a. Ask a panel to prepare a presentation and respond to questions on the following topics: development, public relations, recruitment.

b. After the participants have read this booklet, invite a development director of a school in the area to conduct a seminar.

c. In small groups, ask the participants to design a public relations calendar for a Catholic school.

d. Ask participants to interview a Catholic school administrator on one of the following topics: quality Catholic education, sound business practices, effective public relations, the generation of human and financial resources. A large group discussion of these interviews should include ideas for improvement gained by reading the text.

e. Using the ideas in the booklet, ask participants

to brainstorm ways the classroom teacher can play a positive role in a Catholic school development, public relations and recruitment program.

Step 4: Endings—choose from among the following:

a. Ask participants to write a brief paragraph summarizing the attitude a classroom teacher should have about a Catholic school development program.

b. Have the participants work in pairs sharing three (3) significant ideas they have learned from studying this material.

c. List key words given by the participants; ask them to briefly explain the meaning of each.

d. As a teacher in a Catholic school, write a 60-second radio spot to be used in a public relations or recruitment program.

Step 5: Closing Prayer.

PLANNED FORMAT—SINGLE SESSION

Minutes

5 Step 1: Prayer:

Song: You are the Light of the World

Scripture, Matt. 28: 18-20. After the scripture is read, reflect briefly on the role of the Catholic school in bringing the light of the gospel to the world.

5 Step 2: Ask participants to give their observations about public relations, recruitment and development programs in Catholic schools they have experienced.

15 Step 3: Assuming the participants have read the booklet ahead of time, ask them in small groups to develop a persuasive argument to convince local school leaders of the advantage of initiating a comprehensive development program.

Minutes		
20	Step 4:	Have the small groups report to the larger group the main theories of their argument.
3	Step 5:	Leader summarizes main themes from the booklet and the class discussion.
2	Step 6:	Close with the song on the theme, "You are the light of the world."

INDEPENDENT STUDY

Step 1: Prayerfully reflect on the theme: Jesus has called his followers to be light, salt and leaven for the world.

Step 2: Before reading the book, scan the headings and write a phrase on what you predict the contents will say.

Step 3: As you read the text, keep a list of key ideas that you discover

Step 4: After reading the text, identify three (3) obstacles that you think would have to be overcome to begin a comprehensive development program for a Catholic school.

Step 5: Visit a development director of a Catholic school and discuss the ideas in this booklet and how they are being implemented in that school.

Step 6: Read the scriptures, Matt. 28: 18-20.

ABOUT THE AUTHOR

Jerry Jarc is director of Development, Diocesan Education Office, Diocese of Cleveland. He is responsible for initiating and coordinating effective public relations, marketing and resource development programs in the 26 secondary schools of the Cleveland Diocese, and acts as a consultant to the elementary schools in the diocese.

Jarc has been a secondary school teacher and development director, responsible for a $7.5 million capital campaign. He has served as fiscal manager for the Diocese of Erie (Pa.), and as development officer for the Archdiocese of Omaha.

A frequent contributor to *Today's Catholic Teacher* and *Fund Raising Management Magazine*, he also has produced two booklets on development. Jarc also conducts seminars and workshops and does private consultation work for schools and dioceses.

NCEA KEYNOTE SERIES

1. *Distinctive Qualities of the Catholic School*
   Father Edwin J. McDermott, S.J.
2. *A History of Catholic Schooling in the United States*
   Father Harold A. Buetow
3. *Development and Public Relations for the Catholic School*
   Jerry A. Jarc
4. *Governance and Administration in the Catholic School*
   Brother Theodore Drahmann, F.S.C.
5. *Catholic School Finance and Church-State Relations*
   Brother Terence McLaughlin, F.S.C.
6. *Student Moral Development in the Catholic School*
   Sister Mary Peter Traviss, O.P.
7. *The Parent, the Parish, and the Catholic School*
   Dr. Ed Weisse
8. *The Teacher in the Catholic School*
   Sister Francis Raftery, S.C.
9. *Curriculum in the Catholic School*
   Brother Robert J. Kealey, F.S.C.
10. *Catechetics in the Catholic School*
    Father James F. Hawker
11. *Methods of Teaching in the Catholic School*
    Sister Mary Leanne Welch, PBVM

TITLES IN PREPARATION

Total Development of the Student in the Catholic School

Research and the Catholic School

National Catholic Educational Association
1077 30th Street NW, Suite 100
Washington, D.C. 20007-3852